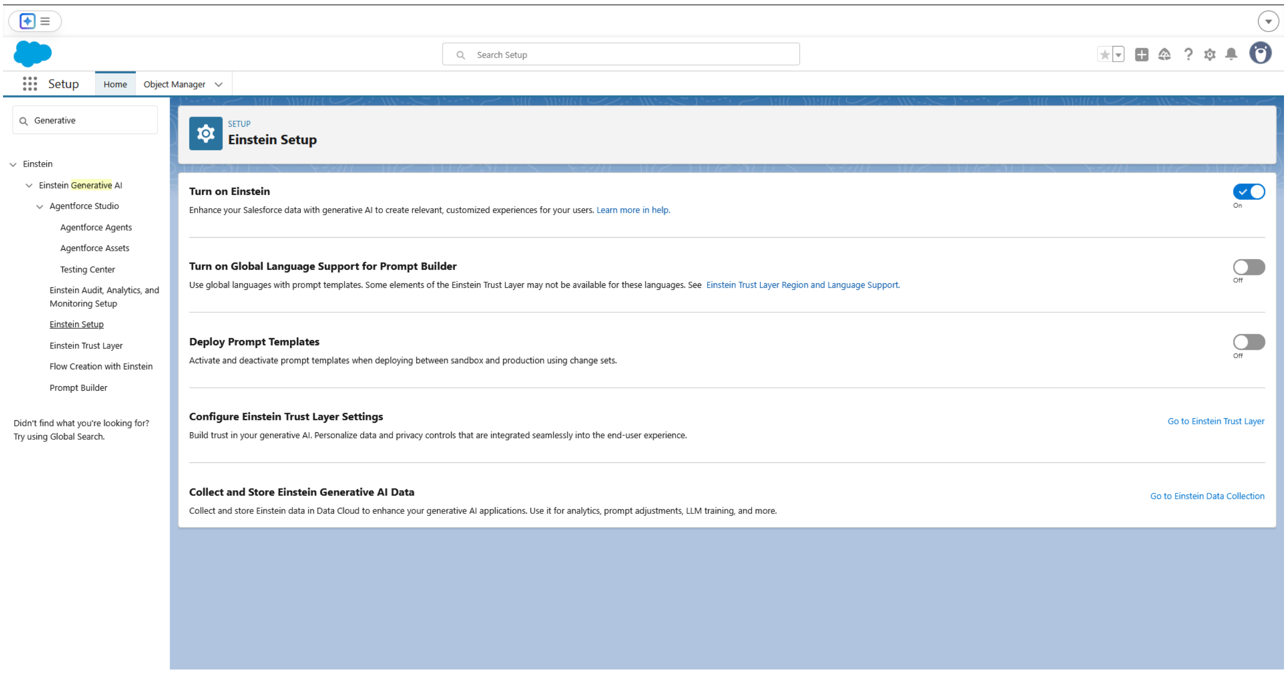
Phone Number Formatter Setup

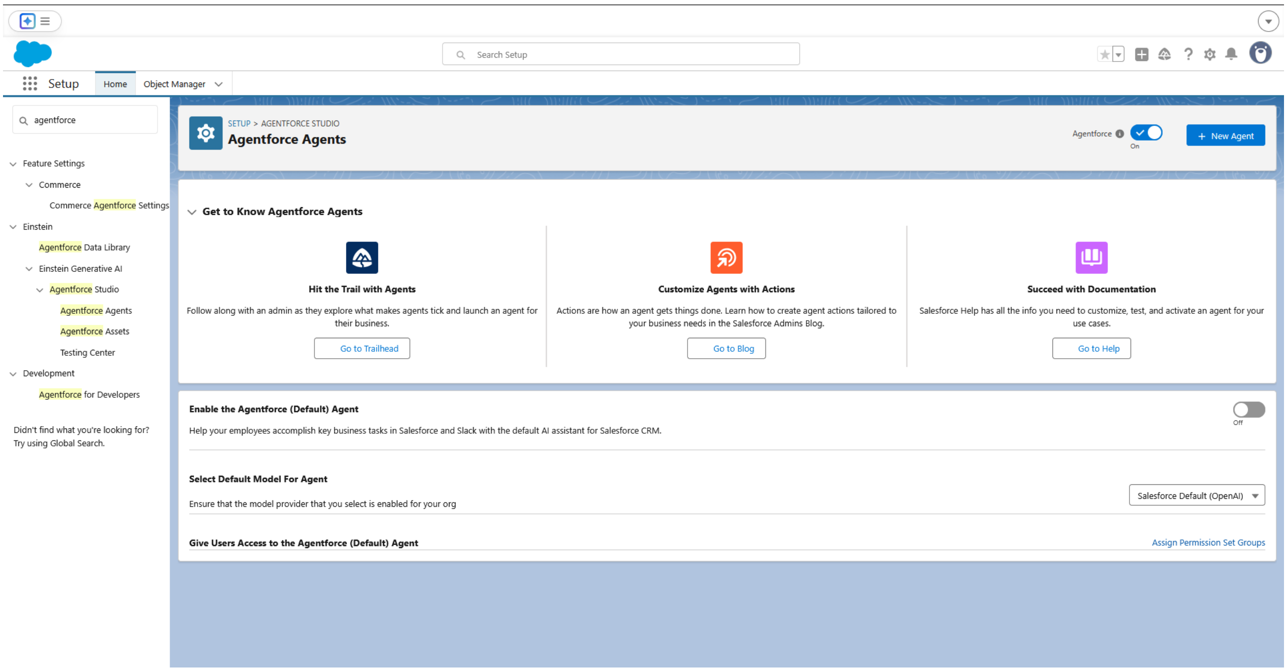
This guide will walk you through the necessary steps to install and configure the Phone Number Formatter managed package.

Pre-installation Steps

1. Ensure that your Salesforce org has Einstein Generative AI enabled. This can be found by typing "Generative" into the Quick Find of the *Setup* tab in your Salesforce org.



2. Enable Data Cloud. This can be found by typing "Data Cloud" into the Quick Find of the *Setup* tab and selecting *Data Cloud Setup Home*. Enable Data Cloud and follow the instructions for setting it up in your org.
3. Enable Agentforce Agents. This can be found by typing "Agentforce" into the Quick Find of the *Setup* tab in your Salesforce org.



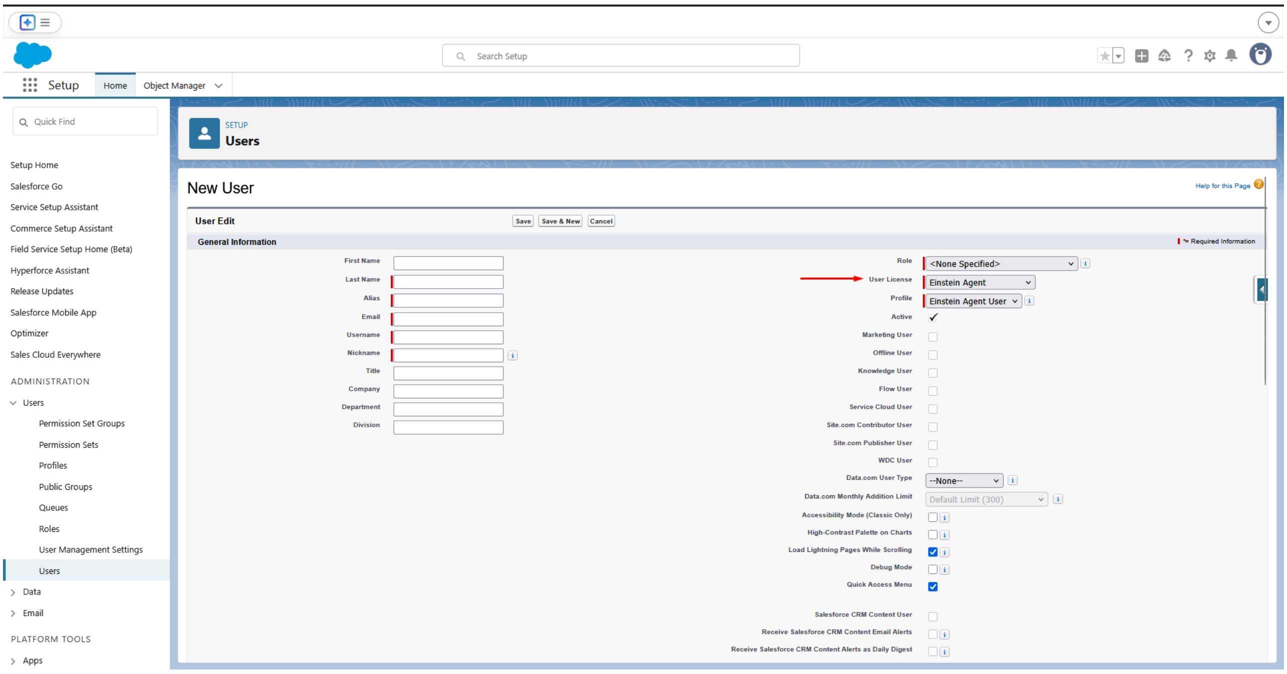
Installation

1. Install the *Phone Number Formatter* package from Agent Exchange.

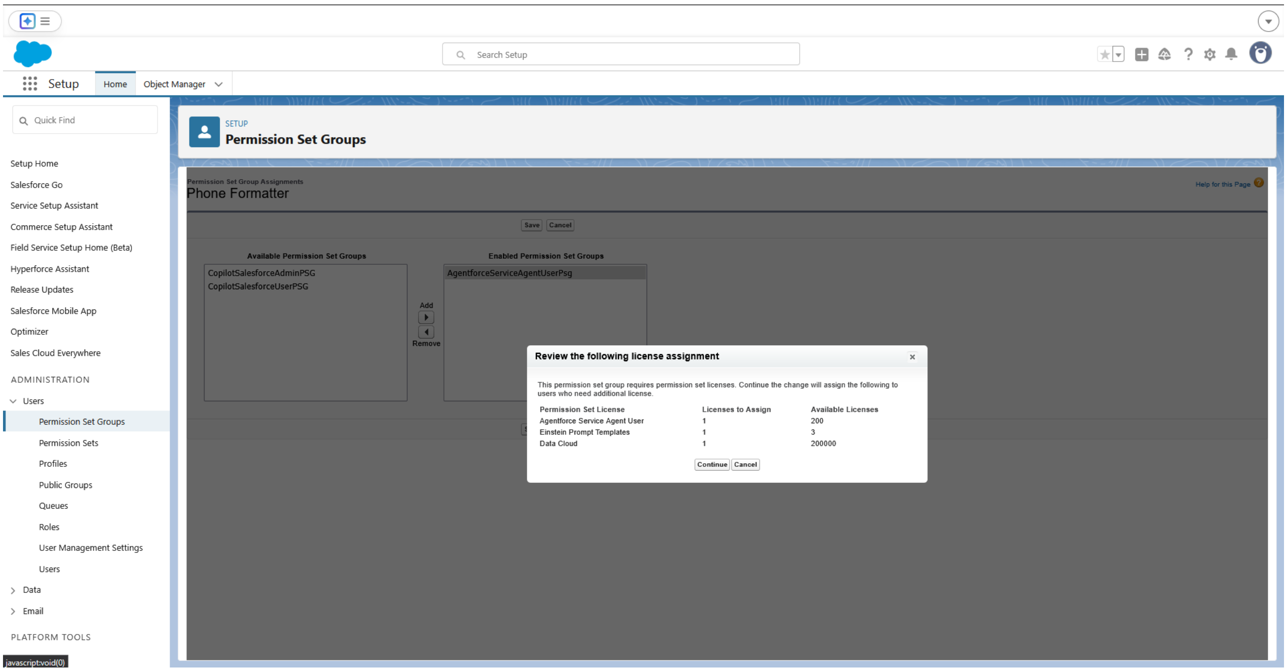
Post-Installation Steps

Create a User

1. Create a new user. This user will be used by the Agentforce Agent created from the template included in this package. Create the user like normal and fill out the mandatory fields following your own best practices. Set the **User License** to *Einstein Agent*. This should change the **Profile** to *Einstein Agent User*.

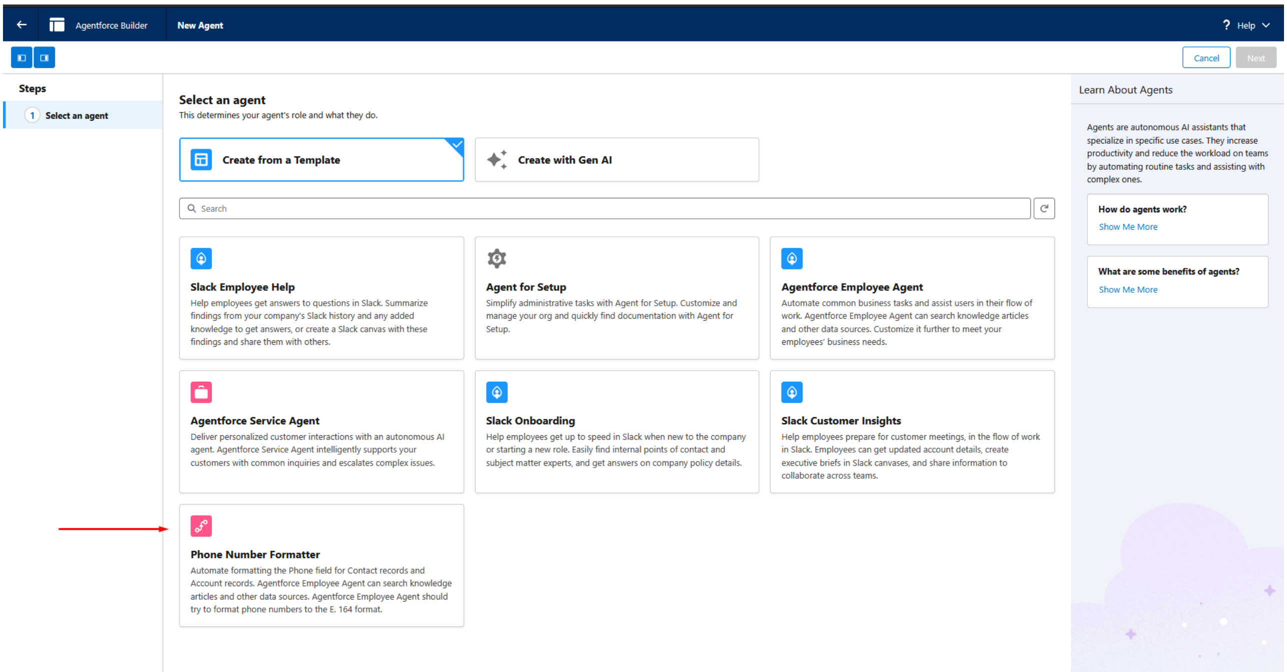


2. Save the user once you have entered the above information.
3. Assign the Permission Set **AMC Formatter Permissions** to the user.
4. Assign the Permission Set Group **AgentforceServiceAgentUserPsg** to the user. It will ask you to review the assigning of 3 licenses to the user that are associated with this Permission Set Group. Select *Continue* and your user is now ready to be used by an Agent.

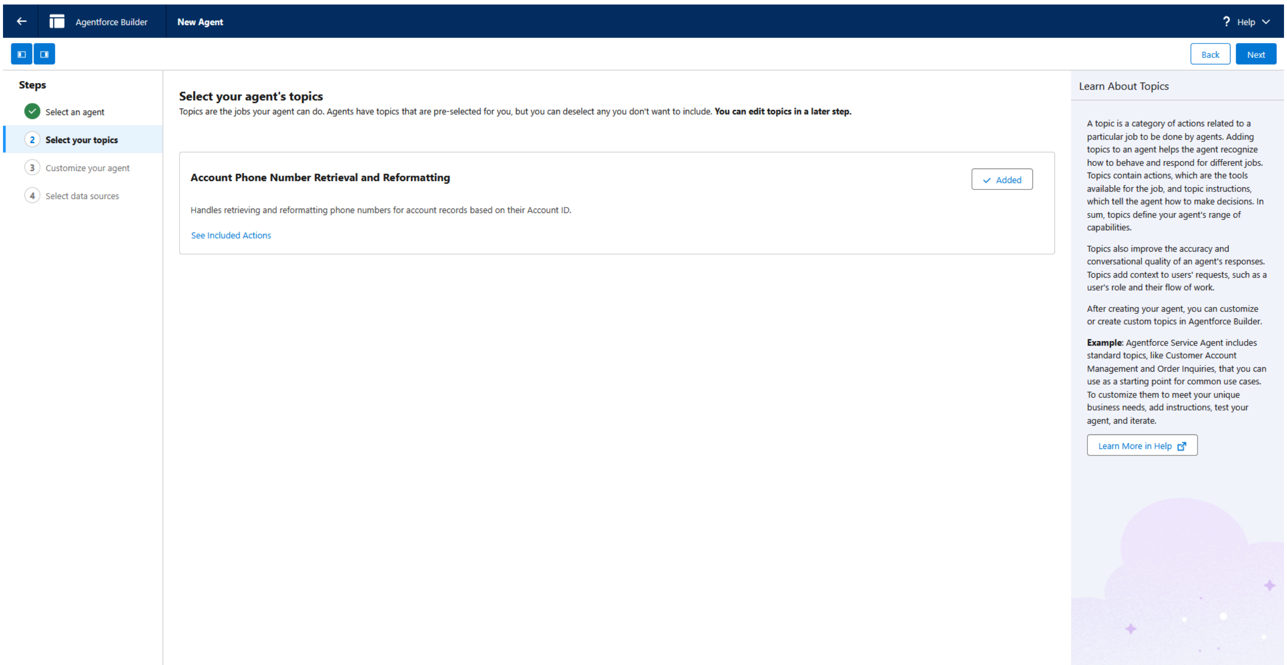


Create an Agent

1. From the Agentforce Agents menu that was previously visited select the *New Agent* button. This will open the **Agentforce Builder**. From there select the *Phone Number Formatter* template an click *Next*.



2. The default topic that is added is the only one that is needed. Click *Next* again.



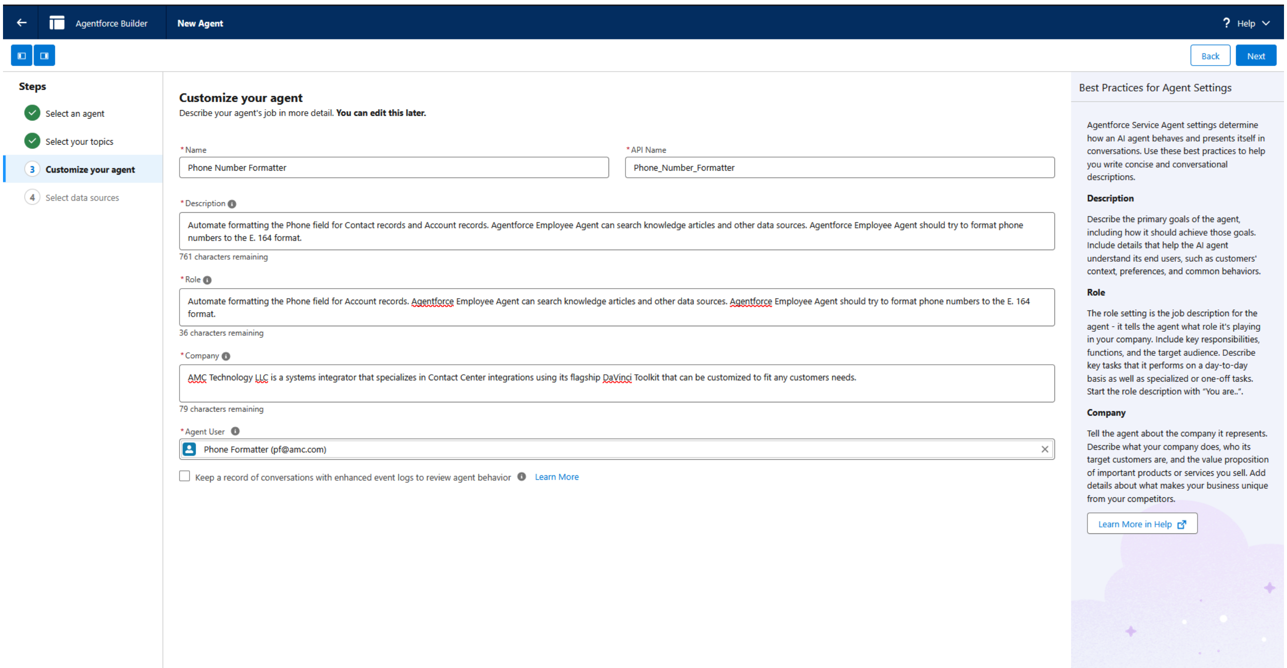
3. In the **Customize your agent** step you will need to fill in the *Role*, *Company*, and *Agent User* field.
4. Copy the below text into *Role* field.

> Automate formatting the Phone field for Account records. Agentforce Employee Agent can search knowledge articles and other data sources. Agentforce Employee Agent should try to format phone numbers to the E. 164 format.

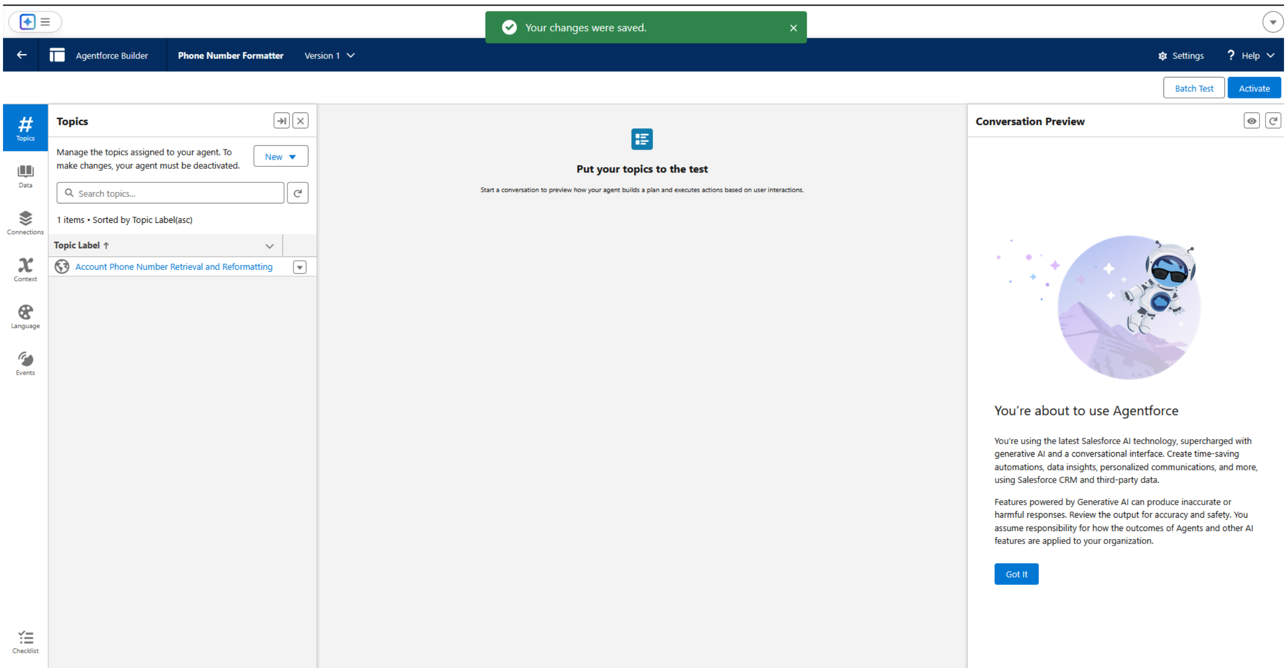
1. In the *Company* field input a description of your company. Below is an example.

> AMC Technology LLC is a systems integrator that specializes in Contact Center integrations using its flagship DaVinci Toolkit that can be customized to fit any customers needs.

1. Finally remove the defualt user and select the user that was created previously for the *Agent User* field.
2. When the fields have been populated the page should look like this.



3. Click the *Next* button again and you will be brought to the **Select data sources (Optional)** page. This is not needed for this agent so Click the *Create* button to create your agent.
4. If the above steps were followed correctly you should get a notification saying your changes were saved.

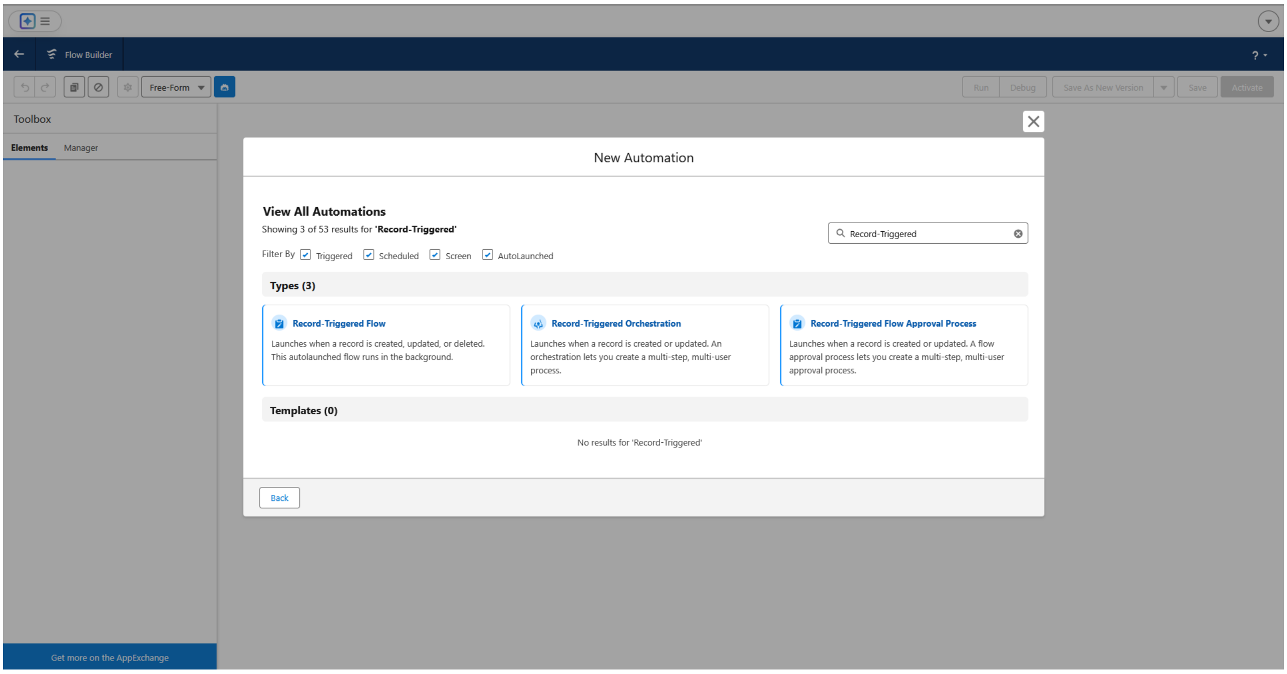


5. Activate your agent by clicking the *Activate* button in the top right of the screen. If you didn't add a data source to your agent Salesforce will warn you about it. Continue the activation process ignoring the popup.

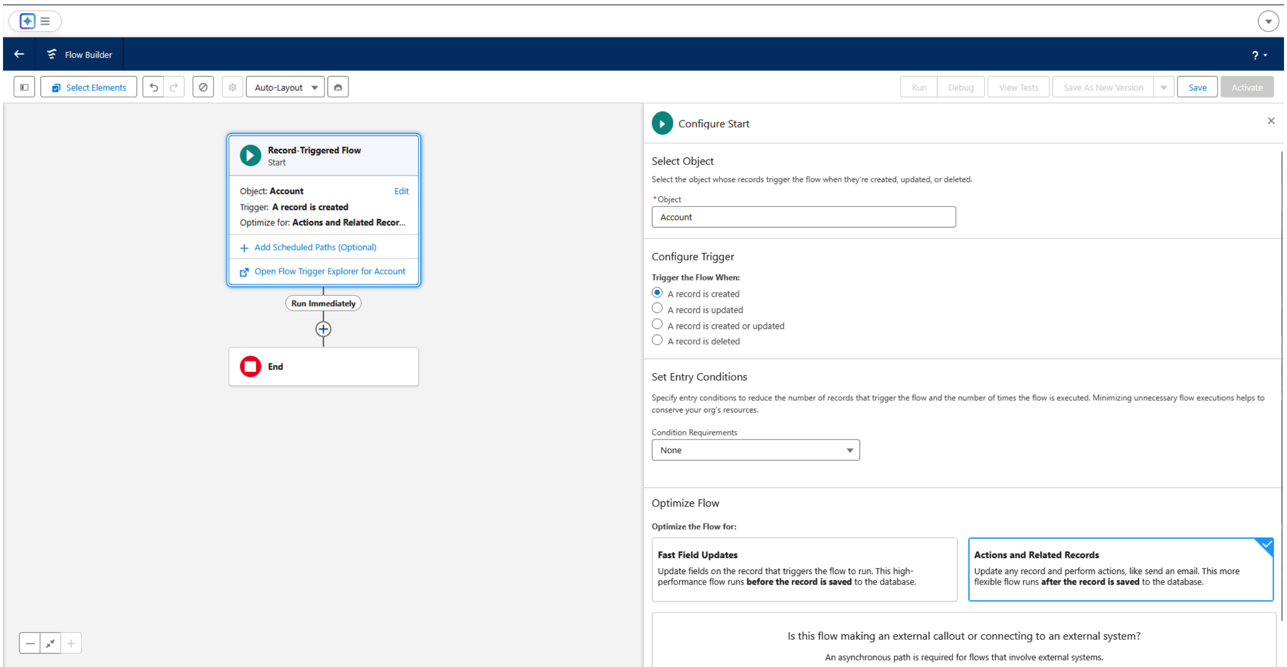
How to Trigger the Agent

1. This is the last setup step needed to activate your agent. In the *Setup* tab type "Flows" in Quick Find. Navigate to the *Flows* page.
2. Create a new Flow by clicking the *New Flow* button.

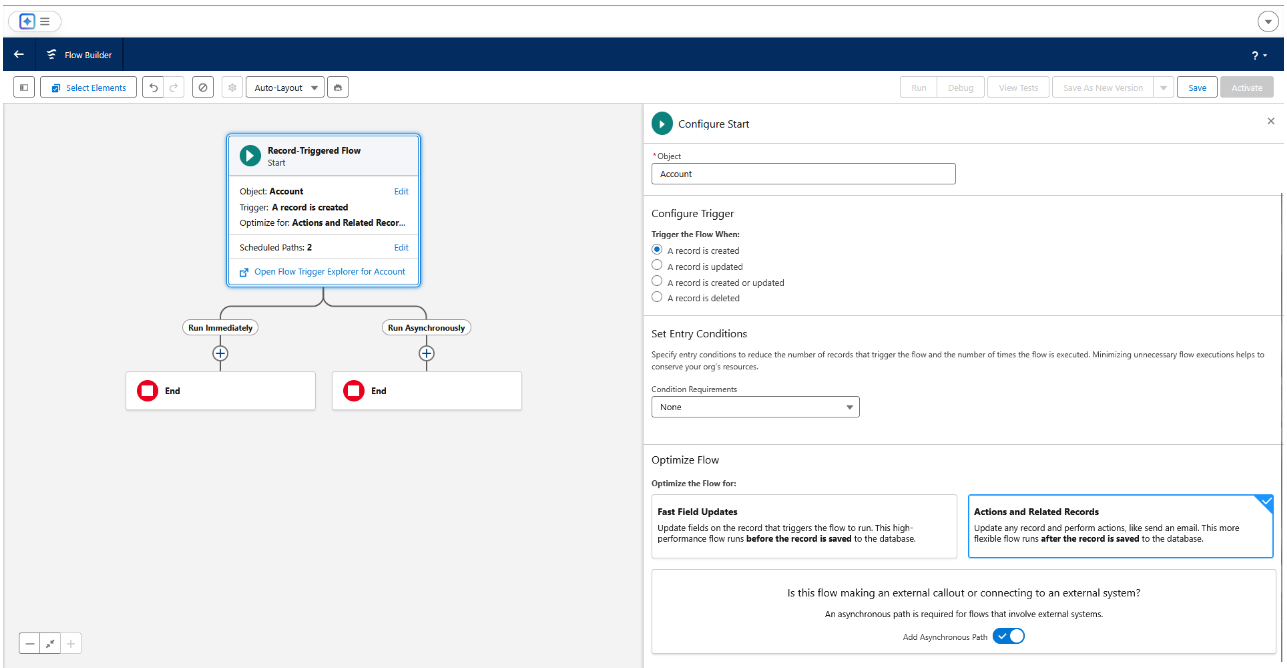
3. Search for "Record-Triggered" in the search bar and select *Record-Triggered Flow*.



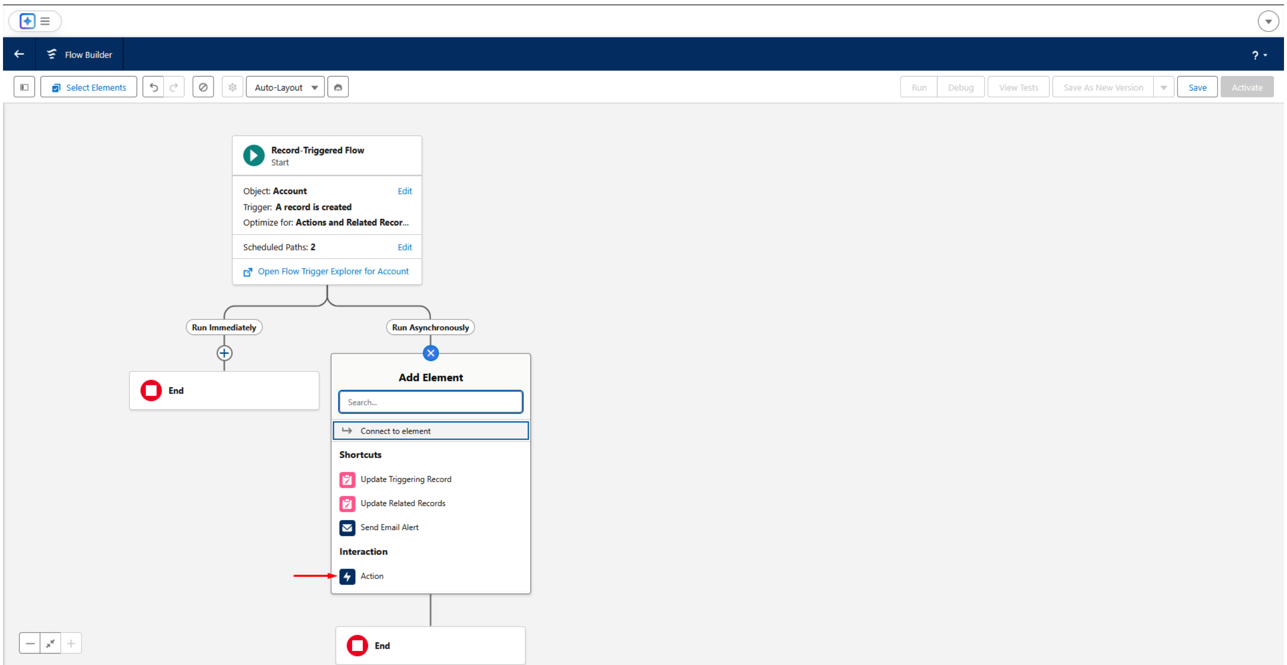
4. You will now be brought to the **Flow Builder**. From here select the *Record-Triggered Flow* element if it is not selected by default. Then for the *Object* field search for and select the *Account* object.
5. Next select the trigger type for this flow. It is recommended to only run this flow when *A record is created*. However it is up to the end user how frequently they want to trigger the agent.



6. Under the *Optimize Flow* section toggle the *Add Asychronous Path* button. This will add an additional path to the flow that is needed to trigger the agent.

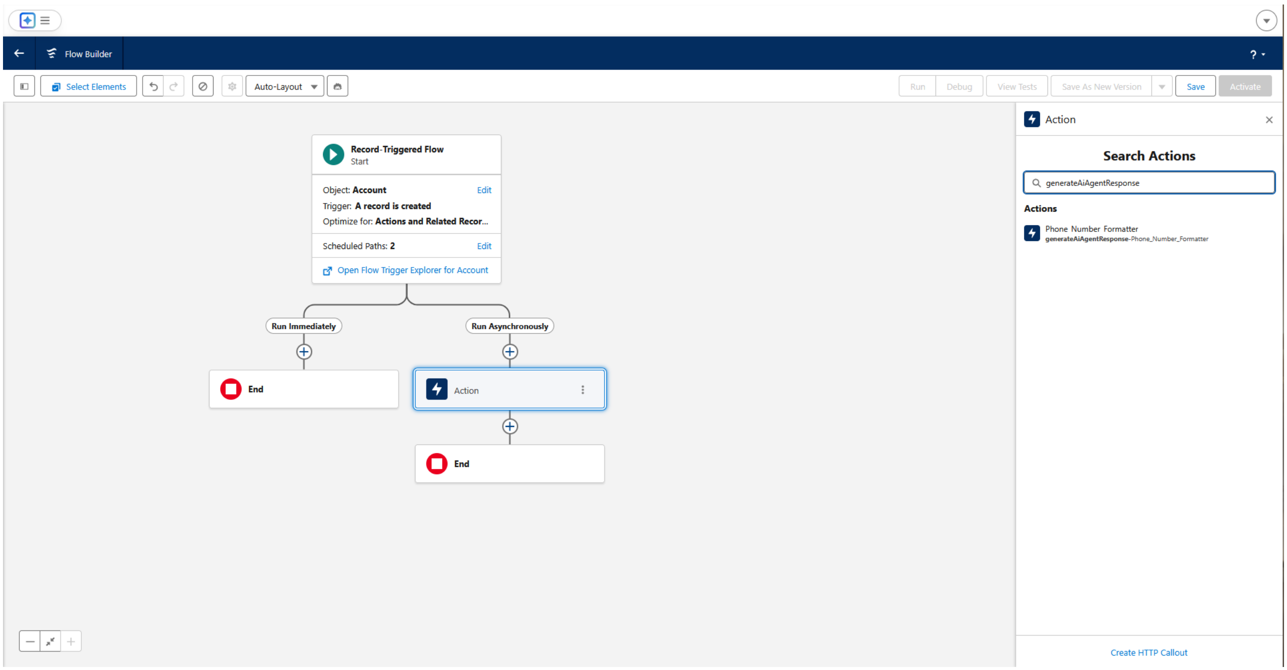


7. Under the *Run Asynchrounously* branch of the flow select the **+** button to add a new element to the flow. Search for "Action" and select the *Action* element.



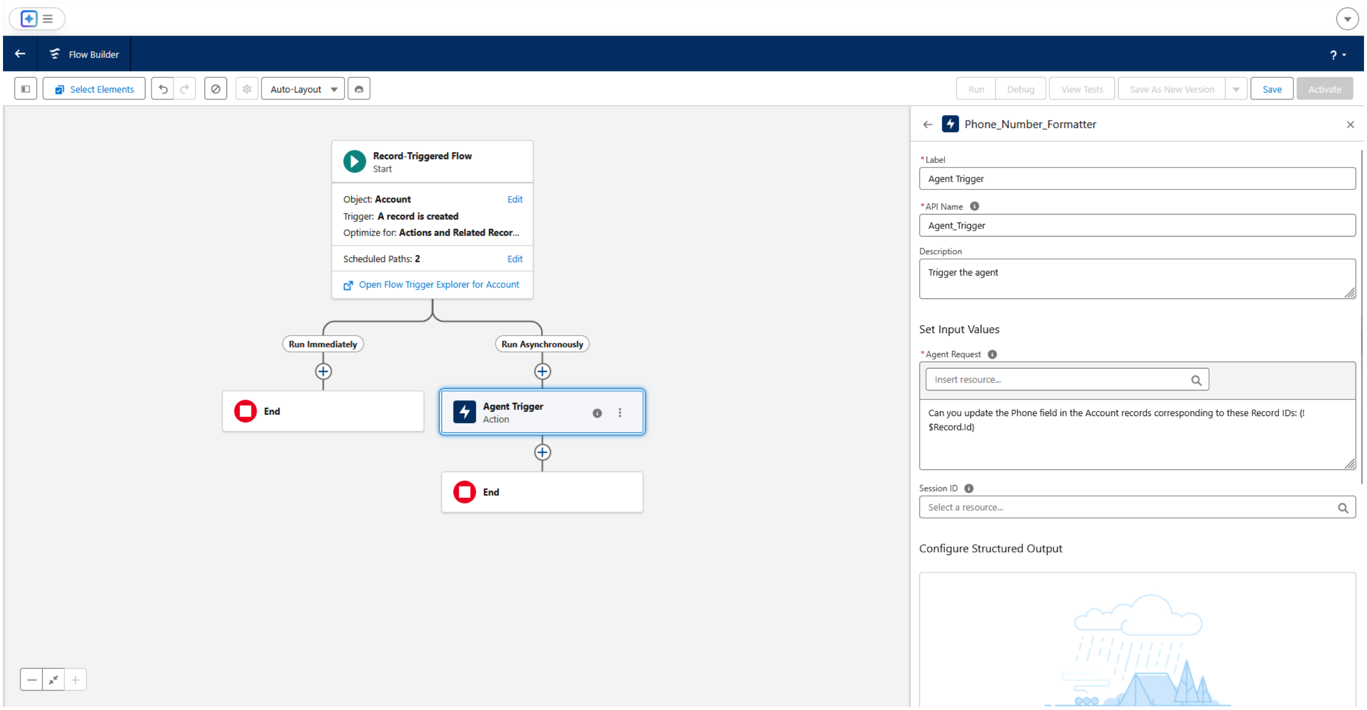
8. Search for "generateAiAgentResponse" in the search bar for the Action you have just added to the flow. A list of actions that can trigger an Agentforce Agent will show up. Select the action related to the

agent created previously.



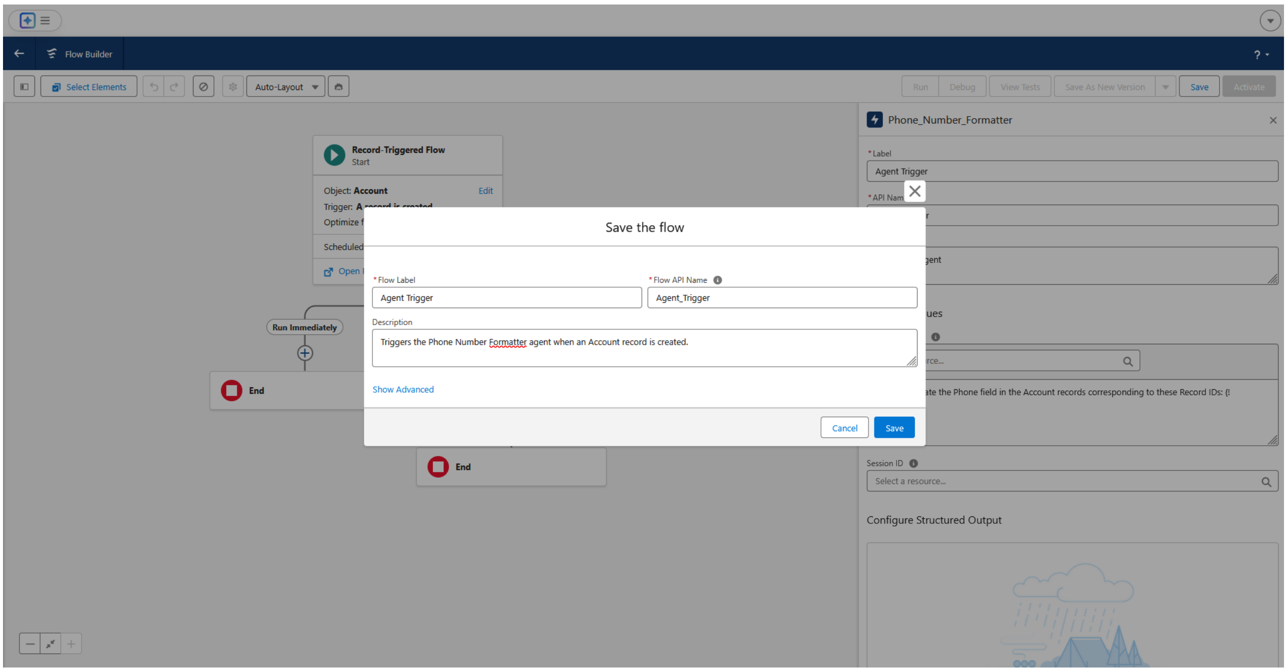
9. Give the Action a *Label* and *Decscription*. In the *Agent Request* copy the following text into it.

> Can you update the Phone field in the Account records corresponding to these Record IDs: {!$Record.Id}



1. Save the Flow by clicking the *Save* button. This will open a dialog box where the *Flow Label* and *Description* need to be filled out. Populate the mandatory field of *Flow Label* and optionally populate

the *Description*



2. Activate the flow via the *Activate* button in the top right.

Usage

If the above instructions were followed to completion whenever a new Account record is created the *Phone* field will be formatted by the Agent. The agent may take some time to run so do not expect records to be reformatted immediately upon saving the new record.